Logging into iPROC

1. Access the IAS web site (http://ias.usda.gov/)
2. Click on 'Requisition Module' link
3. Review the USDA Security Agreement and click the **[Accept]** button to continue
4. Enter **Username** and **Password**
5. Click the **[Log On]** button

Locating a Requisition

To-Do List – Option A

1. Locate the requisition to approve under "To-Do List" on the iProcurement main screen
2. Click on the Notification to view the Notification Details
3. Click on the 'View Requisition Details' link to view the requisition

Approvals Tab – Option B

1. Click the *Requisition Status* tab
2. Click on *Approvals* within the blue header at the top of the page. The default view will show Requisitions to Approve
3. Select the requisition by clicking on the radio button to the left of the requisition number
4. Click on the **Requisition Number** or the **Description** to view the Requisition Details

Notifications Tab – Option C

1. Click the *Requisition Status* tab
2. Click on *Notifications* within the blue header at the top of the page. The default view will show Open Notifications
3. Click the **Subject** link for the requisition you wish to edit. This will open the Notification Details page

Approving a Requisition

Reviewing the Requisition

1. Review the requisition by Reviewing the Requisition Details
2. Click the 'View' link next to the Line Item to review additional details including the Accounting Code
3. Decide on the appropriate action:
   - Approve
   - Reject
   - Approve and Forward*
   - Reassign*
   - Request Information*

* Only viewable from Notification Details

Approving a Requisition

1. After reviewing the requisition and line of accounting, click the **[Approve]** button. An approval confirmation screen will appear

Rejecting a Requisition

1. After reviewing the requisition and line of accounting, click the **[Reject]** button. A rejection confirmation screen will appear

Editing a Requisition

Selecting a Requisition for Editing

1. Follow Option B or C to locate the requisition to be edited
2. Click the 'Edit Requisition' link

Note: During this stage, only requisitions that have not been approved may be edited

Adding Additional Line Items or Modifying Quantity

1. Click the 'Return to Shopping' link to add an additional line item if needed
2. Modify the Quantity from the Approver Shopping Cart page if needed
3. Click the **[Approver Closeout]** button to modify other fields

Editing Delivery Information

1. Edit the **Need-By Date** in the following format: DD-MMM-YYYY (e.g. 30-SEP-2006) if needed
2. Enter the **Delivery-To Location** by searching for the Office
3. Click the **[Continue]** button

Editing Billing Information

1. Edit the **Transaction Code** if needed
   - IQ-COMMIT **–** Should be selected when funding is available in the financial system
   - IQ-NOCOMMIT **–** Should be selected when funding is subject to the availability of funds

Editing Charge Accounts

1. Click on the **Charge Account** link to view the account code entered
2. Change the accounting by selecting the **Charge Account** from the **Nickname** drop-down, or edit a segment by entering/searching for the appropriate value for each segment that needs to be changed
3. Click the 'select multiple charge accounts' link to add/edit multiple charge accounts to a single line item
4. Repeat Step 2 for each Charge Account to be added/edited.
5. Enter/edit the **Percent** or **Quantity** to allocate the funding between the Charge Accounts and click the **[OK]** button
6. Select the 'Apply this account to all requisition lines' check box if the updated Charge Account(s) apply to all line items
7. Click the **[OK]** button
8. Repeat steps if different Charge Accounts apply to each line Item
9. Click the **[Continue]** button

Editing Notes and Attachments

1. Edit the **Requisition Description** if needed
2. Enter the **Note to Buyer** and **Note to Approver**
3. Click 'Add Attachments' if attachments (SOW, Justifications, etc.) need to be included
4. Select the **Attention to** from the drop-down list
5. Enter the **Description** for the Attachment
6. Select appropriate radio button to indicate the **Attachment Type**. If a 'File', click **[Browse]** to search for the file
7. Click the **[Continue]** button

Editing Approver List

1. Click the **[Add Another Approver]** button if additional approver(s) need to be added
2. Select the sequence from the Drop-Down List
3. Search for the Name of the Approver
4. Repeat for any additional Approvers. **Note: The last approver must always be a Budget Approver**
5. Click the **[Continue]** button

Review and Submit Requisition

1. Review all Requisition edits
2. Click the **[Submit]** button

Help and Support

IAS Website

Visit http://ias.usda.gov/ for user guides, procedures/policy documents, release notes, and the latest news on IAS. Also, find Quick Tips and FAQs

Help Desk

IAS Help Desk is the first line of support for IAS Users. All issues encountered need to be logged with the IAS Help Desk to facilitate tracking and resolution. IAS Help Desk addresses User functional and technical issues and provides an avenue for User enhancement and system change requests

- Help Desk personnel are available from 8 AM – 8 PM Eastern Standard Time Monday through Friday
- IAS Users can log and create their Help Desk tickets through the following channels 24 hours a day:
    - Internet: http://www.iashelpdesk.com/request.htm
    - E-mail: support@iashelpdesk.com Telephone: 1-866-IAS-8686

Approving a Requisition

IAS

Quick Reference Guide